# ClientTrack™

PA HMIS – Project Enrollment

This quick reference guide outlines the components of the ClientTrack HMIS solution related to project enrollment efforts. The following projects will be using this workgroup for all project and assessment data collection: Emergency Shelter, Transitional Housing, Permanent Housing, Permanent Supportive Housing, Rapid Rehousing, Homelessness Prevention, and Services Only (Not PATH Funded).

Project Workflow

Projects within ClientTrack are used to record a client's participation in the services offered by the organization. A basic project includes both standard enrollment and exit functionality. It marks the time a client spends in active participation within the organization.

The project workflow guides the user through the process of adding/changing household information, assessing for domestic violence and enrolls the client into applicable projects.

Helpful Tip: *Each client being enrolled into a project must have a data sharing policy enacted. A signed **Client Consent / Release of Information Form** is required prior to sharing any data globally throughout the system. Until project enrollment is complete, no data sharing policy is necessary.*
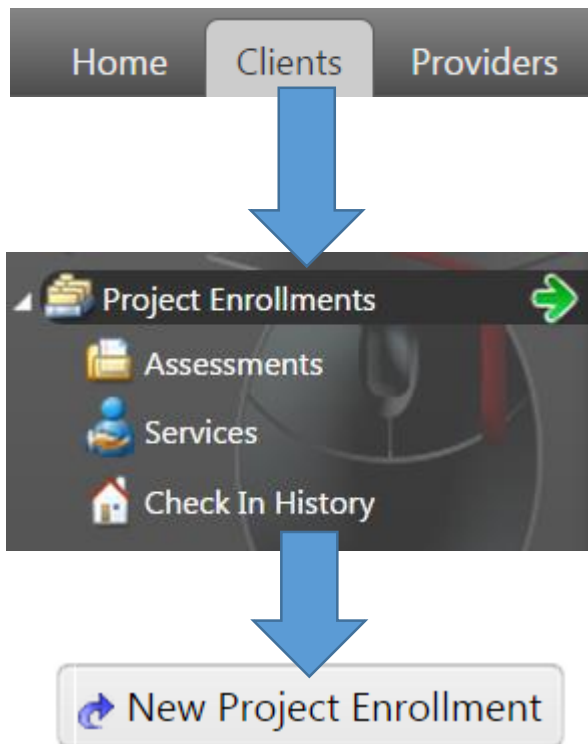
Edit/View Household Members

Before enrolling a client into a Project, it may be necessary to review the household information and make the applicable updates.

Click to edit existing household members, or add new members in the blank lines below

Domestic Violence

Domestic violence assessments are utilized to track and protect clients who are at risk.

The **Domestic Violence Assessment** & **Client Consent for ROI** steps cannot be modified once they are completed

Prior assessments can be used by clicking on this button

If a client answers 'Yes' to the **Domestic Violence Assessment** the information will not be shared until the most recent status is changed to 'No'

Select the level of data sharing to be applied to the new agreement

Helpful Tip: *The workflow only displays the Domestic Violence assessment if there is no current DV assessment on file.*

Globally Shared Intake Elements

Full Data Sharing auto-checks each box, **Partial Data Sharing** allows for manual changes to be made & **No Data Sharing** auto un-checks each box

Client Name:	☑
Alias:	☑
Date of Birth:	☑
Social Security Number:	☑
Ethnicity:	☑
Race:	☑
Gender:	☑
Disabling Condition:	☑
Veteran Status:	☑
Place of Birth:	☑
Housing Status:	☑
Martial Status:	☑
Primary Language:	☑
Driver's License:	☑
Address (Street, City, State, Zip):	☑
Home Phone:	☑
Work Phone:	☑

Globally Shared Transactional Elements ❓

Transactions relate to the client's involvement with the organization

Pre-Enrollment Screenings:	☑ ❓
Project Enrollments:	☐ ❓
Project Assessments:	☐ ❓
Project Services:	☐ ❓

Authorization/Agreement Upload

Creation Date:	10/9/2014
Created By:	Brian Miller
Client:	Clay, James
Agreement Signed:	☐
Agreement Upload:	Choose File No file chosen

If an agreement has been signed, check the corresponding box and upload the file

Project Enrollment

Enrolling a client into a project allows them to take advantage of the services the organization provides.

Program: * HMIS Transitional Housing Program
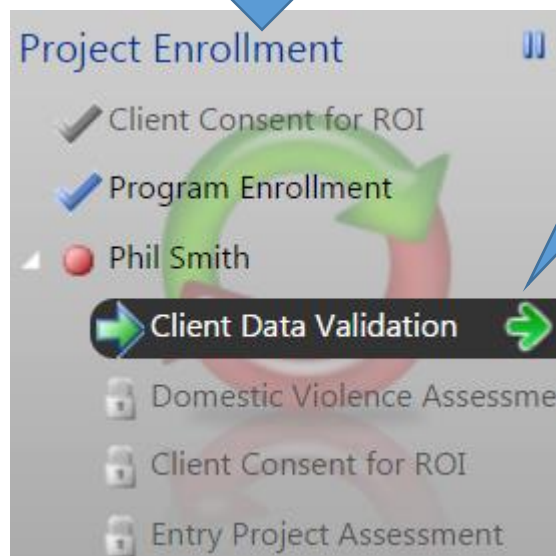
Case Manager: Kamrin Carver

> Once a project is selected, the household members display below to facilitate multiple enrollments

Household - *Excerpt from the HMIS Data Standards Manual* "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

	Name ▲	Gender ▲	Age ▲	Enrollment Date ▲	Relationship to Head of Household* ▲	
☑	Smith, Phil	Male		10/15/2014	Self	
☐	Smith, Paul	Male			-- SELECT --	

> Entering the missing information onto the line enrolls the client into the selected project

Missing Universal (Profile) Data Elements

Project Enrollment ‖

✔ Client Consent for ROI

✔ Program Enrollment

◢ 🔴 Phil Smith

➡ Client Data Validation ➡
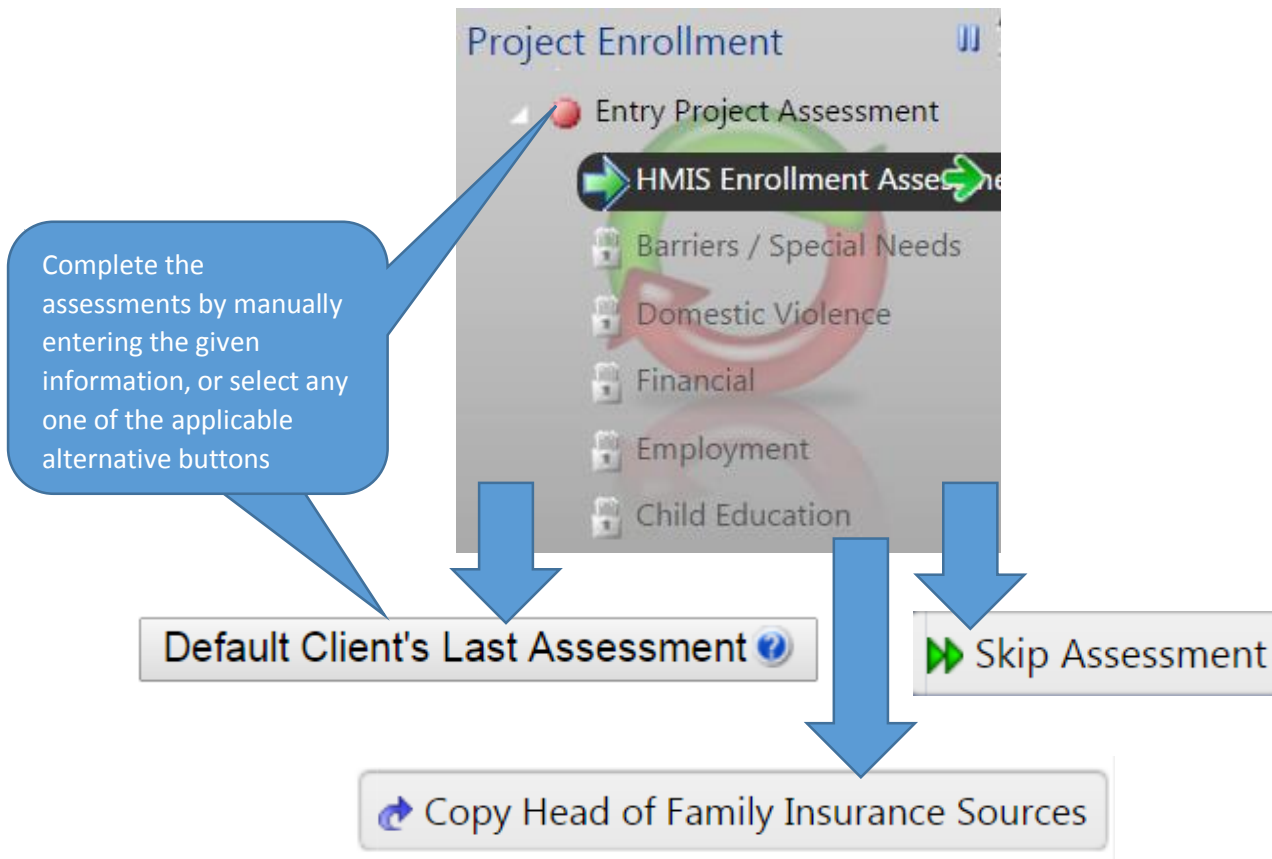
🔒 Domestic Violence Assessmen

🔒 Client Consent for ROI

🔒 Entry Project Assessment

> New enrollments require all data elements to be entered. The workflow expands to facilitate the data completion

Assessments

The **Project Enrollment** workflow takes the user through each of the required assessments. Those assessments that are not required by the project will provide a Skip Assessment option.

Project Enrollment

- Entry Project Assessment
- HMIS Enrollment Assessment
- Barriers / Special Needs
- Domestic Violence
- Financial
- Employment
- Child Education

Complete the assessments by manually entering the given information, or select any one of the applicable alternative buttons

Default Client's Last Assessment ⑦

▶▶ Skip Assessment

↪ Copy Head of Family Insurance Sources

Facility Check-in

After the customers assessments are addressed, the workflow prompts the user to address shelter check-in needs *if* the project is a residential project *and* has facility availability.

❓ **Perform Check-In?**

Perform a Check-In for HMIS Service - Transitional Housing?

✔ Yes, check clients into the Facility

✖ No, complete enrollment

Selecting **No, complete enrollment** closes the workflow and finishes the process

Helpful Tip: When checking customers in to a facility, pay special attention to the header descriptions for guidance and direction.

Household Check In

The Household Check In form will allow the quick and easy check-in of enrolled clients into shelter and housing facility rooms and beds. Please follow the instructions in each header as each entry and selection will cause the remainder of the form to dynamically build the following section.

Client:* **Phil Smith**

Gender: Male

Birthdate:
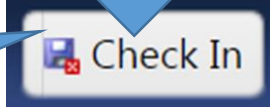
Age:

Household: Smith, Phil - 54

# of Family Members:

Use the name search field to locate each family member, the identifying information displays below once the selection has been made

Project Enrollment:* HMIS Transitional Housing Program 10/15/2014 -

Select the dates and room before assigning the client to a bed and chore

Select the **Project Enrollment** and the family members associated with the project display below

Checked in from:* 10/17/2014 -- 10/18/2014

Room:* South Street Unit #1 (0 out of 4 occupants)

2 records found.

	Name ▲	Gender ▲	Age ▽	Bed ▲	Chore ▲
☑	Smith, Paul	Male		Bed 1 #1	Kitchen Duty
☑	Smith, Phil	Male		Bed 2 #2	Kitchen Duty

Click the **Check-In** button when the process is complete, this closes the workflow

Check In

Transactional Sharing

Each transaction (i.e. enrollment, assessment, service, check-in records) and its sharing are based off of the client's data sharing policy and are shared throughout the system on the Client Dashboard and through individual transactional review screens based on this setting.

Each type of transaction recorded or edited in the system related to one of the four following transaction sharing setting recorded in the client's Data Sharing Policy.   Transactions that are shared can be viewed by users outside of your organization, non-shared transactions will remain viewable only be your organization.

Pre-Enrollment Screenings: will relate to any individual assessment that is collected prior to a project enrollment for eligibility determination and service needs and is currently no used

Project Enrollments: related to the sharing of the full project enrollment record and exit enrollment information

Project Assessments: relate to the individual assessments collected during a project enrollment such as Health, Income, Benefits, Employment, etc.

Project Services: relate to the individual services provided to the client such as Case Management or Rental Assistance and also cover housing/shelter check-ins

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Helpful Tip: When a Project Enrollment record is set to "Not Shared", all assessments and services collected under that enrollment will remain hidden to outside organizations

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Shared Transactions

When the transactional sharing option is selected or checked, the user has the option to set the Sharing restriction setting for the transaction, which defaults to "**Share Transaction**".

Not Shared Transactions

When transactional sharing option is not selected or not checked, the Sharing restriction setting for the transaction defaults to "**Do Not Share Transaction**" and will be hidden on the screen.
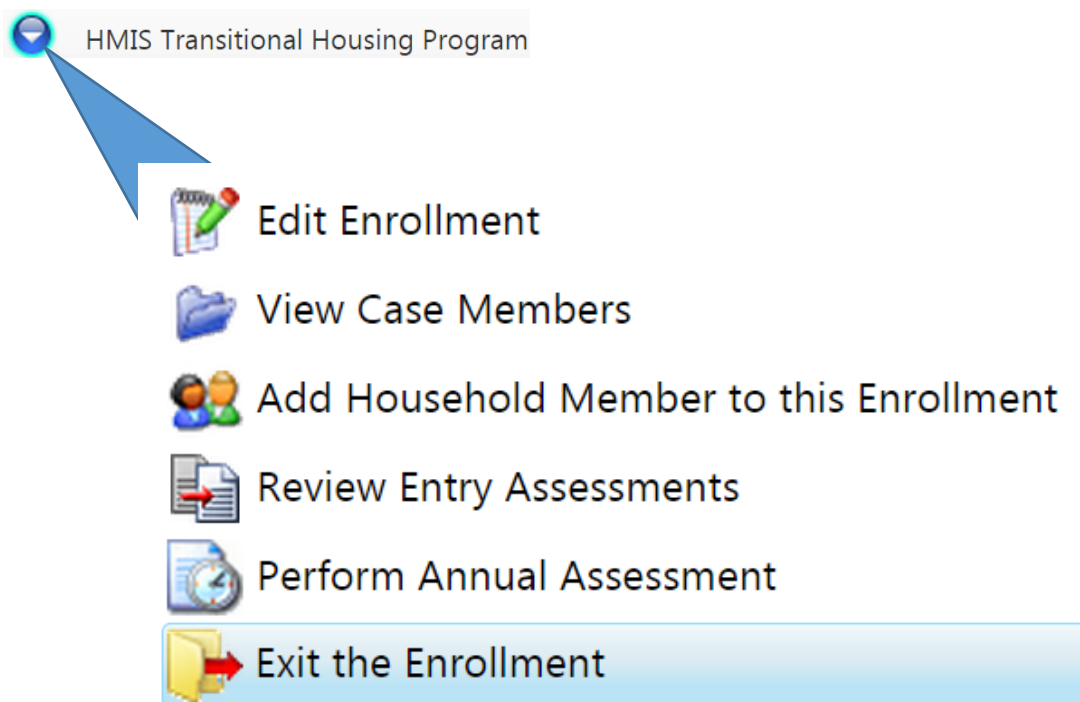

Project Functions

After a client's project enrollment is complete, the user then has the option of viewing, editing, or adding to any of the existing assessments from the client dashboard. Household members can also be added, and the enrollment can be exited from the blue action arrow drop-down menu.

Edit Enrollment

Editing an enrollment consists of modifying the household information

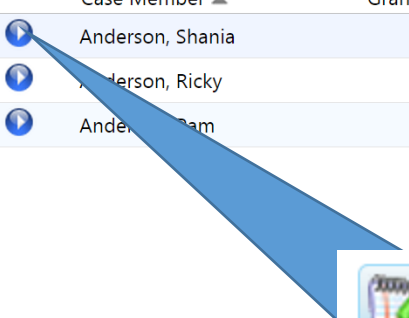|	Name ▲	Gender ▲	Age ▲	Enrollment Date ▲	Relationship to Head of Household* ▲
☑	Anderson, Pam	Female	32	10/19/2014 📅	Self ▾
☑	Anderson, Ricky	Male	13	10/19/2014 📅	Son ▾
☑	Anderson, Shania	Female	10	10/19/2014 📅	Daughter ▾
	3				

Project Sharing: Shared
Restriction:* ○ Do Not Share Transaction ❓

View Case Members

The **Enrollment Case Members** screen allows the user to view a household and to modify the information of its individual members by selecting from the blue action arrow drop-down options. Household members can be edited, exited from the enrollment or deleted from the enrollment.

3 records found.

	Case Member ▲	Grant ▲	Relationship ▲	Enroll Date ▲	Exit Date ▲	Client ID ▲
▶	Anderson, Shania		Daughter	10/19/2014		10375
▶	Anderson, Ricky		Son	10/19/2014		10374
▶	Anderson, Pam		Self	10/19/2014		10370

Edit Enrollment

Exit the Enrollment

Delete Enrollment

Add Household Member to this Enrollment

When adding household members, it is important to first verify that the client is not already listed as part of the family. If they do not display on the **Household Members** screen, add them to the blank row at the bottom of the list.

	First Name* ▲	Middle Name ▲	Last Name* ▲	Name Quality ▲	Gender ▲	Birth Date*
☑	Kelli		Anderson	-- SELECT -- ▾	Female ▾	
☑ ➡	Pam		Anderson	-- SELECT -- ▾	Female ▾	03/17/1982
☑ ➡	John		Anderson	-- SELECT -- ▾	Male ▾	10/18/1983
☑ ➡	Bobby		Anderson	-- SELECT -- ▾	Male ▾	01/14/2001
☑ ➡	Ricky		Anderson	-- SELECT -- ▾	Male ▾	01/18/2001
☑ ➡	Samantha		Anderson	-- SELECT -- ▾	Female ▾	11/29/2001
☑ ➡	Shania		Anderson	-- SELECT -- ▾	Female ▾	11/02/2003
☐	🔍			-- SELECT -- ▾	-- SELECT -- ▾	

Do you want to enroll?

Do you want to enroll Anderson, John?

✔ Yes

✖ No

> After adding the new family member, the **Add Household Member** workflow prompts the user to enroll any family members who are not already enrolled in a project

Review Entry/Exit Assessments

The **Project Assessments** screen allows the user to view existing assessments and complete any missing assessments.

↪ Complete Missing Assessments

HMIS Enrollment Assessment:

1 record found.

	Assessment Date ▲	Assessment	Assessment Type ▲	Program ▲	Assessor ▲
📝	10/19/2014	HMIS Enrollment	Entry	HMIS Transitional Housing Program	Brian Miller

HMIS Health Barrier Assessment:

1 record found.

|	Assessment Date ▲	Assessment	Assessment Type ▲	Program ▲	Assessor ▲
📝	10/19/2014	HMIS Health Barriers	Entry	HMIS Transitional Housing Program	Brian Miller

Perform Annual Assessments

The **Project Annual Assessment** workflow is designed to annually assess all members of the household who are enrolled into a project. Users may update and modify information or skip assessments which do not require an update.
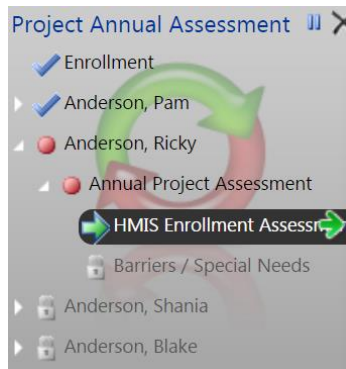
Exit the Enrollment

The system opens a **Project Exit** workflow to remove a client from project participation.

As part of the exit process, the user is required to complete the exit assessments and record the exiting specifics
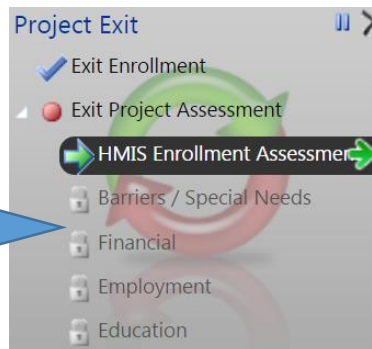
Exit Date:* 10/23/2014
Destination:* Hospital or other residential non-psychiatric medical facility
Reason for Leaving: Left for a housing opportunity before completing program ▾

Assigned Case Manager(s):   Brian Miller
End Case Assignment(s):   ☑